

2013 IA 1040 Iowa Individual Income Tax Form

Example 5

or fiscal year beginning ___/___/2013 and ending ___/___/___

STEP 1: Fill in all spaces. You MUST fill in your Social Security Number (SSN).

Your last name Lowe Your first name/middle initial Janet
 Spouse's last name _____ Spouse's first name/middle initial _____

Current mailing address (number and street, apartment, lot, or suite number) or PO Box
PO Box 54321
 City, State, ZIP
Council Bluffs, IA 98765

Spouse SSN • _____ Your SSN • 999-99-9999

E-Mail Address _____

STEP 2 Filing Status: Mark one box only.

- 1 ☒ Single: Were you claimed as a dependent on another person's Iowa return? ☐ YES ☒ NO ☐ **Dependent children for whom an exemption is claimed in Step 3**
 2 ☐ Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)
 3 ☐ Married filing separately on this combined return. Spouse use column B.
 4 ☐ Married filing separate returns. Spouse's name: _____ SSN: _____ Net Income: \$ _____
 5 ☐ Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and SSN below.
 6 ☐ Qualifying widow(er) with dependent child. Name: _____ SSN: _____

☐ Check this box if you or your spouse were 65 or older as of 12/31/13.

Residence on 12/31/13: County No. • 78 School District No. • 1476

Dependent children for whom an exemption is claimed in Step 3
 How many have health care coverage?(including Medicaid or *hawk-i*) _____
 How many do not have health care coverage? _____

STEP 3 Exemptions

- a. Personal Credit:** Col. A: Enter 1 (enter 2 if filing status 2 or 5); Col. B: Enter 1 if filing status 3) ☐ X \$ 40 = \$ _____ ☐ 1 X \$ 40 = \$ 40
b. Enter 1 for each taxpayer who is **65 or older** and/or 1 for each taxpayer who is **blind**... ☐ X \$ 20 = \$ _____ ☐ X \$ 20 = \$ _____
c. Dependents: Enter 1 for each dependent ☐ X \$ 40 = \$ _____ ☐ X \$ 40 = \$ _____
d. Enter first names of dependents here: _____ e. TOTAL \$ _____ \$ 40

		B. Spouse (Filing Status 3 ONLY)	A. You or Joint
STEP 4 Gross Income	1. Wages, salaries, tips, etc.	1. <u>33,518</u>	<u>33,518</u>
	2. Taxable interest income. If more than \$1,500, complete Sch. B. .	2. _____	_____
	3. Ordinary dividend income. If more than \$1,500, complete Sch. B. .	3. _____	_____
	4. Alimony received	4. _____	_____
	5. Business income/(loss) from federal Schedule C or C-EZ	5. _____	_____
	6. Capital gain/(loss) from federal Sch. D if required for federal purposes	6. _____	_____
	7. Other gains/(losses) from federal form 4797	7. _____	_____
	8. Taxable IRA distributions	8. _____	_____
	9. Taxable pensions and annuities	9. <u>5,841</u>	<u>5,841</u>
	10. Rents, royalties, partnerships, estates, etc.	10. _____	_____
	11. Farm income/(loss) from federal Schedule F	11. _____	_____
	12. Unemployment compensation. See instructions.	12. _____	_____
	13. Taxable Social Security benefits	13. _____	_____
	14. Other income, gambling income, bonus depreciation/section 179 adjustment	14. _____	_____
	15. GROSS INCOME. ADD lines 1-14.	15. _____	<u>39,359</u>

NOTE: Use only blue or black ink, no pencils or red ink.

STEP 5 Adjustments to Income	16. Payments to an IRA, Keogh, or SEP	16. _____	_____
	17. Deductible part of self-employment tax	17. _____	_____
	18. Health insurance deduction	18. _____	_____
	19. Penalty on early withdrawal of savings	19. _____	_____
	20. Alimony paid	20. _____	_____
	21. Pension/retirement income exclusion	21. <u>5,841</u>	<u>5,841</u>
	22. Moving expense deduction from federal form 3903	22. _____	_____
	23. Iowa capital gain deduction; certain sales ONLY. See instructions. ..	23. _____	_____
	24. Other adjustments	24. _____	_____
	25. Total adjustments. ADD lines 16-24.	25. _____	<u>5,841</u>
	26. NET INCOME. SUBTRACT line 25 from line 15.	26. _____	<u>33,518</u>

STEP 6 Federal Tax Addition and Deduction	27. Federal income tax refund / overpayment received in 2013	27. _____	_____
	28. Self-employment/household employment taxes	28. _____	_____
	29. Addition for federal taxes. ADD lines 27 and 28.	29. _____	_____
	30. Total. ADD lines 26 and 29.	30. _____	<u>33,518</u>
	31. Federal tax withheld	31. <u>1,652</u>	<u>1,652</u>
	32. Federal estimated tax payments made in 2013	32. _____	_____
	33. Additional federal tax paid in 2013 for 2012 and prior years	33. _____	_____
	34. Deduction for federal taxes. ADD lines 31, 32, and 33.	34. _____	<u>1,652</u>
	35. BALANCE. SUBTRACT line 34 from line 30. Enter here and on line 36, side 2.	35. _____	<u>31,866</u>



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	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
STEP 7	36. BALANCE. From side 1, line 35		36.	.00 31,866 .00
Taxable	37. Deduction. Check one box. <input type="checkbox"/> Itemized. (include IA Schedule A) <input checked="" type="checkbox"/> Standard		37.	.00 1,900 .00
Income	38. TAXABLE INCOME. SUBTRACT line 37 from line 36.		38.	.00 29,966 .00
	39. Tax from tables or alternate tax	39.	.00 1,464 .00	
	40. Iowa lump-sum tax. 25% of federal tax from form 4972	40.	.00 .00	
	41. Iowa minimum tax. Attach IA 6251.	41.	.00 .00	
	42. Total tax. ADD lines 39, 40, and 41.	42.	.00 1,464 .00	
	43. Total exemption credit amount(s) from Step 3, side 1.	43.	.00 40 .00	
STEP 8	44. Tuition and textbook credit for dependents K-12.	44.	.00 .00	
Tax,	45. Volunteer Firefighter/EMS credit.	45.	.00 .00	
Credits	46. Total credits. ADD lines 43, 44, and 45.	46.	.00 40 .00	
and	47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero.	47.	.00 1,424 .00	
Checkoff	48. Credit for nonresident or part-year resident. Include IA 126 and federal return.	48.	.00 554 .00	
Contributions	49. BALANCE. SUBTRACT line 48 from line 47. If less than zero, enter zero.	49.	.00 870 .00	
	50. Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule.	50.	.00 0 .00	
	51. BALANCE. SUBTRACT line 50 from line 49. If less than zero, enter zero.	51.	.00 870 .00	
	52. School district surtax or EMS surtax. Take percentage from table; multiply by line 51.	52.	.00 0 .00	
	53. Total tax. ADD lines 51 and 52.	53.	.00 870 .00	
	54. TOTAL tax before contributions. Combine columns A and B on line 53 and enter here.	54.	870 .00	
	55. Contributions. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.			
	Fish/Wildlife 55a: <input type="checkbox"/> StateFair 55b: <input type="checkbox"/> Firefighters/Veterans 55c: <input type="checkbox"/> Child Abuse Prevention 55d: <input type="checkbox"/> Enter total.	55.	0 .00	
	56. TOTAL TAX AND CONTRIBUTIONS. Add line 54 and line 55 and enter here.	56.	870 .00	
STEP 9	57. Out-of-state tax credit. Include IA 130.	57.	.00 405 .00	
Credits	58. Motor fuel tax credit. Include IA 4136.	58.	.00 .00	
	59. Check One: <input type="checkbox"/> Child and dependent care credit OR 3,940			
	<input type="checkbox"/> Early childhood development credit	59.	.00 .00	
	60. Iowa earned income tax credit. See Instructions.	60.	.00 .00	
	61. Other refundable credits. Include IA 148 Tax Credits Schedule.	61.	.00 .00	
	62. Total refundable credits. ADD lines 57 - 61.	62.	.00 405 .00	
	63. Tax after credits. SUBTRACT line 62 from line 53. If less than 0, enter 0.	63.	.00 465 .00	
	64. Taxpayers trust fund tax credit. See instructions.	64.	.00 54 .00	
	65. Iowa income tax withheld.	65.	.00 682 .00	
	66. Estimated and voucher payments made for tax year 2013	66.	.00 .00	
	67. TOTAL. ADD lines 62, 64, 65, and 66.	67.	.00 1,141 .00	
	68. TOTAL CREDITS. ADD columns A and B on line 67 and enter here.	68.	1,141 .00	
	69. If line 68 is more than line 56, SUBTRACT line 56 from line 68. This is the amount you overpaid.	69.	271 .00	
STEP 10	70. Amount of line 69 to be REFUNDED	REFUND	70.	271 .00
Refund	For a faster refund file electronically. Go to www.iowa.gov/tax for details			
or	71. Amount of line 69 to be applied to your 2014 estimated tax	71.	.00 .00	
Amount	72. If line 68 is less than line 56, SUBTRACT line 68 from line 56. This is the AMOUNT OF TAX YOU OWE.	72.	.00 .00	
You Owe	73. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F <input type="checkbox"/> Check if annualized income method is used.	73.	.00 .00	
	74. Penalty and interest 74a. Penalty .00 74b. Interest .00 ADD Enter total 74.		.00 .00	
	75. TOTAL AMOUNT DUE. ADD lines 72, 73, and 74, and enter here.	PAY THIS AMOUNT	75.	.00 .00
	You can pay online at www.iowa.gov/tax. Mailing address: Iowa Income Tax - Document Processing, PO Box 9187, Des Moines IA 50306-9187. Make check payable to Treasurer, State of Iowa.			

STEP 11 POLITICAL CHECKOFF. This checkoff does not increase the amount of tax you owe or decrease your refund.

<p><input type="checkbox"/> \$1.50 to Democratic Party</p> <p><input type="checkbox"/> \$1.50 to Republican Party</p> <p><input type="checkbox"/> \$1.50 to Campaign Fund</p>	<p><input type="checkbox"/> \$1.50 to Democratic Party</p> <p><input type="checkbox"/> \$1.50 to Republican Party</p> <p><input type="checkbox"/> \$1.50 to Campaign Fund</p>
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STEP 12 I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.

PLEASE

SIGN HERE

SIGN HERE

Your Signature	Date	<input type="checkbox"/>	Check if Deceased	Date of Death	Preparer's Signature	Date
Spouse's Signature	Date	<input type="checkbox"/>	Check if Deceased	Date of Death	Preparer's PTIN	Firm's FEIN
					Daytime Telephone Number	Daytime Telephone Number



This return is due April 30, 2014. Please sign, enclose W-2s, and verify SSNs.
MAILING ADDRESS: See line 75 above.